Instructions are *green italic*, remove when done.

If red, type there, and font will be correct format.

***Please complete each section in full and as templated to avoid delays in******approval,*** *and ensure all instructions are removed prior to submitting for approval.*

*To be completed and approved prior to approaching the market, extending a contract or awarding a contract. Written approval for an exemption must be obtained:*

* *for any procurement to be conducted outside of Procurement Policy (school-led framework)*
* *for a material change to the Procurement Value, requirement or scope of a procurement or contract that would otherwise require re-approaching the market or using a higher threshold approach than originally used.*

*Ensure that the request includes all potential spend/extensions/scope changes to ensure that approval is based on the total potential requirement and further exemptions will not be requested.*

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| **Exemption Request – Urgent Fencing****(for School-led Projects)** |

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| **The What** |
| **Procurement Title** | Urgent Fencing at [Name of the School] (the School) [K2/Reference number if available] |
| **The Buyer** | School Board for [Name of the School] |
| **The Supplier** | *Add supplier name when using exemption types 1, 3, 4, 6, 7 and 8.* |
| **Exemption Type** | Exemption from open tender to closed tender (approach at least three suppliers for a quote). |
| **Exemption Reason** | **Urgent** **situation** – high risk of harm to students or staff (e.g., urgent fencing required to ensure a student’s safety). |
| **The Requirement** | The school requires the [design and build] of a fence that meets the following requirements:[Insert here what you’ve put in your quote, including design requirements, dimensions, timeframes. Note: If you want to procure the design separately, you will need to clarify this.]  |
| **The Why** |
| **Background** | Urgent fencing is required at the school due to health and safety concerns regarding a student who has been deemed a significant abscondment risk by the School, verified by the OT report. |
| **Rationale/ Justification** | Urgent requirement to ensure the health & safety of a student. Unforeseen circumstances due to [the school having little or no advance warning of the student transferring to their school, etc. Copy wording from OT report as needed].The suppliers listed above were selected because:* They are likely to respond to the quote.
* They are located in the same area as the school.
* They have the capability to meet the requirements.
* They have responded to recent, comparable tenders.
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| **The How** |
| **Proposed Procurement Approach** | * Procurement method to be used:
	+ Closed tender (multiple written quotes)
* Evaluation method to be used:
	+ Conformance and best value
	+ Weighted attribute: % weightings and rationale for % weightings
* The quote to the following suppliers has already been issued, due to the need for urgency:
	+ Supplier 1
	+ Supplier 2
	+ Supplier 3
* Value for money will be determined by one or more of the following:
	+ Comparison amongst tender responses
	+ Comparison with prices for comparable recent contracts,
	+ Review by independent Quantity Surveyor
	+ Project Manager’s experience of market rates

The exemption will be limited to a minimum scope and value as outlined in the quote. |
| **Procurement Value***Refers to value of this procurement only* | $[amount] Intended to spend$[amount] 10% contingency**$[amount] Exemption Value and Total Procurement Value**[Explanation or composition of procurement value and how it was estimated (e.g. benchmarked from previous projects, Quantity Surveyor used, etc.)] |
| **Risks** | Risk: Complaint from a potential supplier that contract opportunity was not openly advertised on GETS.Treatment: We are seeking multiple quotes from those suppliers who are likely to have responded should this quote have been issued on GETS. Some residual risks remains but the benefit of undertaking an urgent procurement in this instance outweighs the risk.Risk: Value for money is not attained.Treatment: Having a competitive process will encourage tenderers to provide competitive pricing. If the quotes received do not represent value for money, the school may negotiate directly with tenderers to see if pricing can be reduced. Risk: No quote is received.Treatment: Directly approaching suppliers to see if they can meet our needs. |
| **Conflicts of Interest** | Everyone involved in the procurement (including as an evaluator) are listed below and have signed a conflict of interest form:* [Name], Board of Trustee representative
* [Name], Project Manager, [Organisation]
* [Name, Role], [Organisation]
* [Name, Role], [Organisation]

The following conflicts of interest have been declared: [Nil] *or* [Detail these and detail the Conflict of Interest Management Plan] |
| **Endorsement/Approval** |
| Requested by Procurement Sponsor (Board Representative) | [Signature][Name] [Date] |
| Endorsed by(Property Advisor) | [Signature][Name] [Date] |
| Approved by(Ministry Procurement Advisor/Manager) | [Signature][Name] [Date] |

**Endorsement/Approvals – Board of Trustee (school-led) Property Procurement**

All requests must be endorsed by a Ministry Property Advisor.

The endorsing Property Advisor emails the request form to:**SP.Procurement@education.govt.nz**

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| **Procurement Value** | **Endorsement** | **Approval** |
| $100,000 – up to $349,999 | TPHM Property Advisor/Infrastructure Manager  | **Principal Advisor - School Property Procurement** |
| $350,000 or more | TPHM Property Advisor/Infrastructure Manager | **Manager, Infrastructure Procurement**  |